Meat Rules!

The 2022 Power of Meat report underscores U.S. consumers' protein preference.

Meat — genuine, real meat — is alive and well in the diets of U.S. consumers, according to the 17th annual Power of Meat report released in March. It indicates 98.5% of American households purchase meat. Volume of meat sales increased 3.9% last year, compared to pre-pandemic levels.

"The Power of Meat shows Americans continue to count on meat's taste, quality, convenience and value throughout another unusual and challenging year," says Julie Anna Potts, president and CEO of the North American Meat Institute.

And, Americans are well educated about their protein preferences.

"Shoppers' Meat IQ is higher than ever, and the Power of Meat shows they are looking for even more ways to purchase meat and get inspiration for preparing meals," says Rick Stein, vice president of fresh foods for FMI—The Food Industry Association. "Retailers are constantly working to give shoppers more choices in the meat department and further enhance in-store and online shopping options."

Top 10 Findings

1.

The combination of higher prices and home-centric meals led to another sales record for meat, despite lower volume.

Dollar sales increased 0.3% to $81.8 billion, but volume could not keep pace with 2020 sales and was down 5.6%. Shoppers made fewer meat trips but spent more per trip, while household penetration remained high, at 98.5% (IRI†). Convenience-focused meat and poultry thrived as consumers looked for time savings and interesting flavors.

2.

Consumers are well aware of supply chain challenges and inflationary pressures and are adjusting purchases.

Seventy-five percent of consumers have noted higher meat/poultry prices and 43% see fewer promotions. In response, 61% save by eating out/ordering in less and instead try to recreate restaurant experiences at home (62%). Additionally, 72% have changed retail meat purchases.

3.

The population's share of meat eaters remained strong and meat/poultry permissibility remains high.

Meat eaters make up 74% of consumers compared with 71% last year. Flexitarians make up 16% and vegans/vegetarians remain at 6%. Seventy-three percent of consumers agree that meat belongs in a healthy, balanced lifestyle, but even so, 37% try to eat a little less of it.

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†In addition to the Power of Meat shopper survey data, IRI provided numerical overlay of the trends highlighted in the survey using point-of-sale and household panel data. References to this data are indicated by the use of the "IRI" citation.

THE POWER OF MEAT

98.5% of American households buy meat

74% of Americans are meat-eaters

COVID-19 drives home cooking & online shopping

80% of meals are eaten at home

57% use meat in 4-7 dinners per week

61% of meat shoppers shop online* (46% do it regularly)

Americans eat avg. **4 home-prepared meals** which include meat every week

*up from just 39% in 2019

Social media is a growing source of inspiration for meat lovers, especially for younger shoppers

51% **of meat shoppers look online as their #1 source for tips/recipes**

- **72%** use a search engine like **Google** while **57%** use **YouTube**
- **53%** of Generation Z shoppers find meat inspiration on **TikTok**

Americans choose meat for a healthy diet & are interested in choices that are good for people, good for the planet

86% of meat shoppers look for **choices that are better** for themselves, their families, workers, animals, and/or the **environment**

32% emphasize meat/poultry that are **better for the planet** and are interested in a variety of characteristics, led by local, grass-fed, and packaging

3 in 4 Americans agree **meat belongs in a healthy, balanced diet**

The 17th annual Power of Meat study was conducted by 210 Analytics on behalf of FMI—the Food Industry Association and the Meat Institute's Foundation for Meat and Poultry Research and Education

FOUNDATION FOR MEAT & POULTRY RESEARCH & EDUCATION

FMI

For more information, visit: www.FMI.org/FreshFoods and www.meatinstitute.org

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4.

Meat promotions are on the shopper radar amid higher prices, but where they find promotions continues to change.

While fewer promotions were available, 75% of shoppers check specials pre-trip, 80% compare prices/promotions across items in-store and 89% look for the ideal package price.

5.

More shoppers buy meat/poultry at supercenters, clubs and online. But not all items make the cut in online baskets.

Thirty-five percent of consumers have bought at least some meat/poultry online. Seventy-nine percent of Gen Z buy the same meat/poultry items online as they do in store versus just 38% of Boomers.

6.

Digital sources dominate when looking for meat/poultry tips and how tos, with a shift from websites/apps to social media.

Search engines and YouTube are the top platforms for meat tips and how tos. TikTok has become very powerful among Gen Z and Millennials. Consumers search by the kind of meat/poultry (58%), by cut (52%) and cooking method (48%).

7.

Value dominated the meat purchase and private brands grew as a consumer-preferred choice.

Product quality/appearance together with price per pound and/or the total package price dominates the meat purchase. The fourth and fifth factors vary by demographic, ranging from brands and claims to nutrition and preparation knowledge.

8.

The meat case accounts for the bulk of purchases but the service counter serves an important role.

Despite 77% of consumers having access to a full-service counter, a shopper-estimated record 75% of purchases are made at the self-serve meat case. Current access aside, 59% of shoppers value the idea of a service counter for special cuts, advice or special occasions.

9.

Focus on better-for-me/my family remains high; better-for-the-animal, planet and worker matters to about one-third.

Among the 64% weighing better-for-me/my family, leaner cuts are the most common strategy (40%), followed by avoiding second helpings (33%). Among the 32% of people emphasizing better-for-the-planet, local, grass-fed and environmentally friendly packaging are the top meat strategies.

10.

Skepticism surrounding cultivated meat remains, plant-based meat alternatives hold steady and blends have potential.

Forty percent of consumers are unwilling to try cultivated meat versus 29% being open. Plant-based meat alternatives remain mostly an occasional choice with only 9% eating them weekly. HW

Editor's note: The Power of Meat 2022 study was conducted by 210 Analytics, LLC on behalf of FMI — The Food Industry Association and the Meat Institute's Foundation for Meat and Poultry Research and Education. The report was made possible by Sealed Air Food Care Division/Cryovac. For study information/questions, please contact Anne-Marie Roerink, principal, at aroerink@210analytics.com. For questions about NAMI, please contact Ann Wells at awells@meatinstitute.org. For questions about FMI, please contact Rick Stein at rstein@fmi.org.

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